Printed Documentation
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Welcome

Welcome
This document provides background and procedural information for using the Logisuite Lite software. Since business requirements and user preferences can vary for each company, the material contained herein should be viewed as a general guide only.

As you step through the material, please remember that your specific business needs will govern selection from the various options and preferences described. Similarly, certain selections will require that some tasks be repeated, while other selections will allow you to omit certain tasks entirely.

Who Should Use this Guide?
This guide assumes users are already familiar with Microsoft Windows.

About this Guide
Logisuite Lite User Guide is organized as follows:

Section 1 Introduction, provides an overview of Logisuite functions and features, identifies resources for getting the support you need and describes application start and exit procedures.

Section 2 Installation, describes the Logisuite operating environment, including workspace, menu bar and toolbars.

Section 3 Getting Started, describes the user login and authentication, starting and exiting Logisuite software and other important aspects related to users and security.

Section 4 Logisuite Environment, describes the Logisuite operating environment, including workspace, menu bar and toolbars.

Section 5 Customizing the Environment, provides information for specifying default settings for Logisuite software, and for adding and/or customizing workspace menu bar and toolbar display.

Section 6 Working with Logistics, provides information about creating customers, vendors, warehouse receipts, and using advanced features like search & filters, print & export.

Section 7 User Access Rights, describes the important aspects related to users, security groups and the access rights for the system modules.

Glossary, provides Logisuite concepts and terms.

Conventions

Conventions
Conventions are the same or similar to Windows conventions, including:

- Display conventions
- Typographic conventions
- Symbols Used in this Guide

Display Conventions
Logisuite adhere to Microsoft Windows conventions for using menus, menu commands, dialog boxes, command buttons, icons and mouse. See your Windows manual for more information.

Typographic Conventions
This guide uses the following typographic conventions to identify special information.

<table>
<thead>
<tr>
<th>Convention</th>
<th>Information Type/ Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; &gt; (angle brackets), &lt;Shift&gt; + &lt;F1&gt;.</td>
<td>Keystrokes</td>
</tr>
<tr>
<td></td>
<td>Ex: &lt;Enter&gt;</td>
</tr>
<tr>
<td></td>
<td>Key combinations are denoted by a plus sign between</td>
</tr>
</tbody>
</table>
CD \LOGISUITE <Enter>

Commands entered at DOS prompt are shown in larger text. Within DOS commands, variable names and keys are shown in *italics*.

**Bold type**

Fields names within an explanation.

*Ex:*

Use rules set by selected **Start on** option.

**BOLD UPPERCASE**

Field names that require a description.

*Ex: DESCRIPTION*

Name or brief narrative describing item.

**[square brackets]**

Field description options and labels.

*Ex: [Width] - horizontal length in inches.*

**Italic type**

Dialog box names.

*Ex: Page Properties dialog displays.*

### Symbols Used in this Guide

Look for the following symbols as you read through this guide:

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Information Type</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Note" /></td>
<td><strong>Note</strong></td>
</tr>
<tr>
<td><img src="image" alt="Note" /></td>
<td>This symbol calls your attention to additional information.</td>
</tr>
</tbody>
</table>
Introduction

In this section:

- Product Overview
- Getting the Answers You Need

This section provides an overview of Logisuite Lite, its functions and features, identifies resources for getting the support you need and describes application start and exit procedures.

Product Overview

Logisuite Lite is a powerful Logistics Software System with an affordable price. Its features and ease of use make it a perfect match for small Freight Forwarders and Warehouses on a low budget.

Logisuite Lite handles all the requirements of a Cargo Warehouse operation including Warehouse Receives, Warehouse Withdraws, Labels, On Hand Reports and Invoices. The Ocean Export and Air Export modules provide an array of features including Quotes, Bookings, Manifest, Labels, Waybills (Houses, Masters, Directs) and reports that will let you keep track of your company operations at all times.

For our new release we have taken the request of our customers in consideration and added QuickBooks export support. This feature was previously only available in the Enterprise Edition of our Freight Forwarding Software. Now you can easily export invoices to QuickBooks saving time and reducing errors.

Logisuite Lite consists of the following integrated modules:

- Accounting Bridge Lite
- Cargo Warehouse
- Ocean Freight Export
- Air Freight Export
- Standart Forms

Getting the Answers You Need

Getting the Answers You Need

Logisuite Corporation provides the following resources to help you learn and use Logisuite.

- Customer Support
- Logisuite Training
- Help
- Related Guides

Customer Support

If you purchased this product directly from Logisuite Corporation, you can contact the Customer Support Center for your region at the number listed below.

- United States of America
  +1 800 318 1834
  support@logisuite.com

The Logisuite Customer Support Center provides telephone technical assistance Monday through Friday, from 6:30 a.m. to 5:00 p.m. Pacific Standard Time.

If you have a problem with your Logisuite product, contact the Logisuite Customer Support Center. A Logisuite product specialist will take your call and ask for the following information:

- Your name, organization, telephone number and address.
Printed Documentation

- Logisuite product name and version number.
- A complete description of the problem, including any error messages displayed on your monitor or printed at your printer.

Logisuite Live Support Online
You can talk live with our support specialist by accessing the Logisuite Website at http://www.logisuite.com and selecting [Live Support Online]. You will be required to provide your name, email and question and click [Start Chat] to initiate a live chat with the support specialist.

Logisuite Website Support
You can also obtain product support by accessing the Logisuite World Wide Web page at http://www.logisuite.com and selecting [Contact Support]. Please complete the question form.

The Logisuite Web site allows you to:
- Raise a question for Logisuite Support.
- Find answers in a list of Frequently Asked Questions.
- Download the latest product releases and patches.
- View the latest product release notes.

Help
Logisuite Lite software uses the Microsoft Windows Help program to provide online Help for all product functions.

Related Guides
If you require further information about a specific topic or wish to obtain product background information, reference the following resources, all of which are part of the Logisuite Lite documentation package.

- Logisuite Warehouse User Guide
- Logisuite Ocean Export User Guide
- Logisuite Accounting User Guide
Installation

In this section:
- System Requirements
- Installing Logisuite Lite
- Uninstall Logisuite Lite

This section guides you through the installation and registration processes for Logisuite Lite. It describes the system requirements necessary to install and run Logisuite Lite on your computer.

This section also describes procedures for repairing and uninstalling Logisuite Lite.

System Requirements

The minimum system requirements for running Logisuite Lite are:

Software Requirements
To run Logisuite LE2008 you need one of the following operating systems installed on your computer:
- Windows XP with Service Pack 1.0a or higher
- Windows 2000 Professional with Service Pack 3.0 or higher
- Windows NT 4.0 with Service Pack 6.0a or higher

The application also requires Internet Explorer 5.5 or above.

Hardware Requirements
You need the following minimum hardware requirements to run Logisuite LE2008 on your computer:
- Processor: 350 MHZ Pentium required, Pentium III or higher recommended
- RAM: 64 MB required, 256 MB recommended
- Hard disk space: 10 GB (with 650 MB free space for Windows 2000 or Windows NT, and 1.5 GB free space for Windows XP)
- VGA or SVGA monitor that supports 1024 x 768 screen resolution or higher

Installing Logisuite Lite
This section provides instructions for installing Logisuite Lite.

It is highly recommended that you close all programs before you install or uninstall any software.

To install Logisuite Lite software:

1. Insert the Logisuite Lite CD into your CD-ROM drive.
   If your computer is set up to automatically run a CD, the Welcome to Logisuite Lite screen displays.
Welcome to Logisuite Lite dialog

If you do have the CD or you downloaded the installation kit from Logisuite Website, you will need to run the setup from your machine as follows.

1. From the Start menu, select Run.
2. Run `path\setup.exe` (replace path with the directory location of Logisuite setup on your hard drive) and click OK.
   The Welcome to Logisuite Lite dialog displays.

3. Click Install.
   The System Pre-requisites dialog displays.

   Installing system prerequisites. This may take a few minutes...
   Installing OLEDB Jet components...
System Pre-requisites dialog

The program takes few seconds to install system pre-requisites like OLEDB Jet, PDF Export components necessary for the working of Logisuite Lite software. Once the installation is completed the following dialog is appears.

![System Installation dialog](image)

System Installation dialog

4. Select [Standalone Installation] and then click **Next**.
The **License Agreement** dialog displays.
Please read the complete software license agreement for using the Logisuite products.

5. Select [I Accept the Agreement] and click Next. The Company Information dialog displays.

Please enter the necessary details related to your company; for example, Company Name, Phone, Email, etc.
It is highly recommended that you provide all the pertinent information related to your company. This would be stored in the system and can be modified later from within the system.

6. Click **Next**.
The System Administrator dialog displays.

```
System Administrator dialog
```

Please enter the following information to define the administrator account for the Logisuite Lite software administration and management.

- **USER ID**
The user identifier representing the administrator account for the software.

- **PASSWORD**
The password set for the administrator account.

7. Click **Next**.
The System Directory dialog displays.
Do nothing if you want to install the Logisuite software in the default directory, i.e. [C:\Program Files\LogisuiteLE2008], else click the directory browser to select another directory location.

8. Click **Next**.
   The *Install Application* dialog appears that displays the status of installation.
Once the installation is completed, the following dialog appears.

9. Click **Finish** to close the dialog.

**Uninstall Logisuite Lite**
To uninstall Logisuite Lite, you need to follow the steps below.
It is highly recommended that you close all programs before you uninstall this software.

To uninstall Logisuite Lite:

1. From the Start menu, choose Programs>LogisuiteLE2008>Uninstall Logisuite OR choose Control Panel>Add/Remove Programs. The Add or Remove Programs dialog displays.

2. Scroll down and select [Logisuite Lite Edition].
3. Select Change/ Remove button and click Next. The Confirm Uninstall message box displays.

4. Click Yes. The System Uninstall dialog appears displaying the components being removed.
Once all the components of Logisuite Lite are removed, the *Reboot* message box appears.

5. Click **Yes**.

The system restarts to remove any additional dependencies and registry entries.
Getting Started

Starting and Exiting Logisuite

Logisuite Lite software can be started from either the Windows Start menu or shortcut icon on the Windows Desktop.

Starting Logisuite

On Windows taskbar, click [Start] and choose Programs>Logisuite>Logisuite LE2008.

Exiting Logisuite

To exit application, do one of the following:

- Press <Alt> + <F4>.
- Click Exit on File menu.
- Click [X] at top right of application window

Login and Authentication

Once you launch the Logisuite Lite, the system requires the user for login authentication to be able to use the software.

1. Please enter the following information to be able to login to Logisuite Lite.
   - **USER ID**
     Unique identifier representing the administrator account for the software.
• **PASSWORD**
The password defined for the administrator account.

• **COMPANY**
The name of the company defined in the company profile. You can use the drop-list to select the company, if there are multiple companies defined.

2. Click **Login**.

The Logisuite launches with the below splash screen.

Once the splash screen disappears, the Logisuite application is launched which shows the main workspace which is given below.
Different sections of Logisuite workspace are explained in the upcoming sections.
Logisuite Environment

Logisuite Environment

In this section:

- Workspace
- Toolbars

Workspace

When you start Logisuite software, the workspace and all associated components display. The workspace is where application objects are created and maintained.

- **System Menu** provides links to options within the modules.
- **Modules Area** provides modules and applications installed.
- **Toolbar Menu** provides icons for launching various options.
A menu bar with drop-down menus displays directly below the application title bar. These menus provide both standard MS-Windows and application-specific options. Selecting a menu performs an associated action or displays a submenu or dialog.

Directly below the menu bar are toolbars with buttons that provide access to the most commonly used commands and tools.

Navigating the workspace
Workspace components are organized according to function and use. You can navigate to any component by clicking the mouse.

To use menu bar:
Click appropriate menu, then select option from drop-down list.

To use toolbar:
Click button on toolbar corresponding to desired option.

Toolbars

Application Toolbar
Logisuite software provides access to most commonly used application options, which includes the following.

- SWITCH USER
  To logout and switch to a different user.
- USERS
To launch the security setup to review the system users and groups access rights and privileges.

- **HOME PAGE**
  Opens the home page as set using the customize option.

- **CALENDAR**
  To open the active calendar.

- **SEND MESSAGE**
  To send message between the application.

- **INSTANT MESSAGES**
  To use the feature of instant messages between the system users.

- **CUSTOMIZE**
  To launch the customize dialog for setting the various information.

- **SYSTEM SETTINGS**
  To launch the system settings dialog to view/modify the company profile.

- **LOGISUITE SUPPORT SITE**
  To launch the support site for Logisuite product support.

- **HELP**
  To launch the help system.

### Module Toolbars

**Module Toolbars**

All the modules have separate workspace with various toolbars.

### Standard Toolbar

![Standard Toolbar Image]

This toolbar provides access to various standard features:

- **[BACK]**
  To go back to the previous screen.

- **[NEXT]**
  To go to the next screen.

- **HOME**
  To view transaction list.

- **NEW**
  To insert new record.

- **OPEN**
  To open an existing record.

- **COPY**
  To copy the current record.

- **REFRESH**
  To refresh the data for current record.

- **PRINT**
  To print the current record.

- **PRINT PREVIEW**
  To print preview the current record.

- **DELETE**
  To delete the current record.

- **ATTACHMENTS**
  To work with the attachments for this record.

- **HELP**
  To launch the help system for this module.

- **CLOSE**
To close and exit from the module.

For more details related to print feature, please refer to the **Printing Forms & Reports** section in this user guide.

### Search Toolbar

This toolbar provides access to various standard features:

- **SEARCH BY [ ]**
  To select the search criteria. For example, Customer ID, Name, City, etc.

- **FOR [ ]**
  To specify the keyword against the search criteria.

- **SEARCH**
  To start the search based on the selection.

- **RESET SEARCH**
  To reset the search options.

- **BUILD FILTER**
  To build search filter based on the data fields.

- **APPLY/UNAPPLY FILTER**
  To apply or unapply the filter for the search.

- **VIEW TODAY TRANSACTIONS**
  To view only the transactions that occurred on the same day.

- **VIEW THE DAY AFTER**
  To view the transactions the day after.

- **VIEW THE DAY BEFORE**
  To view the transactions the day before.

- **VIEW OPEN TRANSACTIONS**
  To view all open transactions only.

- **VIEW CLOSED TRANSACTIONS**
  To view all closed transactions only.

- **RESET FILTERS**
  To reset all the search filters.

For more details related to search & filters feature, please refer to the **Search & Filters** section in this user guide.

### View Toolbar

This toolbar provides access to various standard features:

- **VIEW ALL CUSTOMERS**
  To view all the customer records in the module.

- **VIEW SHIPPERS**
  To view all the shipper records in the module.

- **VIEW CONSIGNEES**
  To view all the consignee records in the module.
• **VIEW THIRD PARTIES**
  To view all the third-party records in the module.

• **VIEW AGENTS**
  To view all the agent records in the module.
Customizing the Environment

System Settings

The system provides the feature to modify the various system settings for the Logisuite software.

1. Select Setup>System Settings to launch the system settings dialog. The System Settings dialog appears.

2. Edit any parameters and then click [Apply Changes] to save your changes.

You can also modify the system settings of the modules installed on your machine by selecting the appropriate module from the drop-down list. For example, Accounting Bridge, Account Payable, etc.
Customize Company Information

This section describes the parameters for modifying the company information.

Company Settings
You can modify the following parameters related to company profile.

- **COMPANY NAME**
  Name identifying the company profile
- **ADDRESS 1**
  First line of the company address.
- **ADDRESS 2**
  Second line of the company address.
- **CITY**
  City of the company address.
- **STATE**
  State of the company address.
- **US ZIPCODE**
  ZIPCODE of the company address.
- **COMPANY PRIMARY PHONE**
  Primary phone number of the company.
- **COMPANY FAX**
  Fax number of the company.
- **COMPANY EMAIL ADDRESS**
  Email address of the company.
- **COMPANY WEBSITE**
  Website address of the company.

General Settings
You can modify the following parameters related to general information.

- **CUSTOMER ID**
  Unique identifier for the Customers.
- **VENDOR ID**
  Unique identifier for the Vendors.
- **DEFAULT WEIGHT UNIT**
  Default unit to measure weight. Choose either KGS or LBS.
- **DEFAULT DIVISION**
  Default division code applicable for the system.
- **DEFAULT CURRENCY**
  Default currency code applicable for the system.
- **ENABLE DIVISION COUNTER FOR GLOBAL HOUSE**
  Check identifying the division counter for global house.
- **ENABLE GLOBAL HOUSE**
  Check identifying the global house.
- **GLOBAL HOUSE LOG COUNTER**
  Check identifying the log counter.
- **ENABLE CHECK PRINTING ON FORMS**
  Check identifying the mark printing on forms.
- **ENABLE CHECK PREVIEW ON FORMS**
  Check identifying the mark preview on forms.
- **ENABLE WEB STATUS**
  Check identifying the web status.
- **ENABLE BILLING CODES FILTER BY DIVISION**
Check identifying the billing codes filter by division.

**Accounting Settings**
You can modify the following parameters related to accounting.

- **DEFAULT ACCTS RECEIVABLE GL ACCOUNT ID**
  Unique identifier for Accounts Receivable General Ledger Account.

- **DEFAULT ACCTS PAYABLE GL ACCOUNT ID**
  Unique identifier for Accounts Payable General Ledger Account.

**Backup Settings**
You can modify the following parameters related to system backup.

- **SYSTEM AUTOBACKUP**
  Check identifying the auto backup option for the system.

- **PRIMARY AUTOBACKUP PATH**
  Primary directory location for the auto backup. If it is not provided, the program will backup on the system root directory.

- **SECONDARY AUTOBACKUP PATH**
  Secondary directory location for the auto backup. If it is not provided, the program will backup on the system root directory.
Working with Logistics

In this section:

- Working with the Customers
- Working with the Vendors
- Working with the Warehouse
- Using Search & Filters
- Using Print & Export

This section describes the tasks related to adding customers and vendors to the Logisuite software along with setting up codes for billing & charging. Moreover, it covers advanced features like search & filters, print & export, etc.

You need to refer to the relevant user guide/help for each of the modules installed with the Logisuite Lite software.

System Menu

The system menu on the Logisuite workspace provides the user with modules to work with different options. For example to work with customer and vendor information click Maintenance menu option.
Working with the Customers

You can add new customer, remove existing customer and view information related to the existing customers.

Add Customer Record

To add a new customer:

1. Click Customers under the [Accounting - Customer] menu. The Customers dialog appears.

2. Select File>New Record or click [New] on the toolbar. The New Record tab is added to the Customers dialog.

3. Enter the following information:
• **CUSTOMER ID**
Unique identifier for defining new customer. Based on the system settings, this field is automatically generated for every new customer record.

• **NAME**
Name of the customer.

• **ADDRESS**
Address of the customer.

• **CITY**
City of the customer.

• **STATE**
State of the customer.

• **ZIP**
Zip code for the customer.

• **COUNTRY**
Country of the customer.

• **PHONE**
Phone of the customer.

• **FAX**
Fax of the customer.

• **CONTACT**
Contact person in the customer company.

• **MOBILE**
Mobile number of the contact person.

• **EMAIL**
Email of the contact person.

4. Select from one of the following [Account Status] options;

• **PROSPECT**
Account status identifying a customer as a future prospect.

• **ACTIVE**
Account status identifying an active customer.

• **ON HOLD**
Account status identifying a customer under processing.

• **NON ACTIVE**
Account status identifying a non-active customer.

5. Select from one of the following [Account Type] options;

• **SHIPPER**
Account type identifying the customer account as a shipper.

• **CONSIGNEE**
Account type identifying the customer account as a consignee.

• **THIRD PARTY**
Account type identifying the customer account as a third-party.

• **AGENT**
Account type identifying the customer account as an agent.

---

**Contacts**

To add/edit/delete contacts information for the customer:

1. Click the [Contacts] tab to view the relevant information.

   The Contacts tab appears.
2. Right click and select from one of the following:

- **ADD**
  To add a new contact for the customer.

- **EDIT**
  To edit an existing contact for the customer. You should select the record, right-click and choose [Edit] from the popup menu.

- **DELETE**
  To remove an existing contact for the customer. You can use the keyboard key [delete], click [Delete] on the toolbar or select the record(s), right-click and choose [Delete] from the popup menu.

The user can sort the list by clicking on the appropriate column headers. Moreover, it is also possible to rearrange the columns and change the column size.

**Delivery**

To add/edit/delete delivery address information for the customer:

1. Click the [Delivery] tab to view the relevant information.
   The Delivery tab appears.

2. Right click and select from one of the following:

- **ADD**
  To add a new delivery address for the customer.

- **EDIT**
  To edit an existing delivery address for the customer. You should select the record, right-click and choose [Edit] from the popup menu.

- **DELETE**
  To remove an existing delivery address for the customer. You can use the keyboard key [delete], click [Delete] on the toolbar or select the record(s), right-click and choose [Delete] from the popup menu.
The user can sort the list by clicking on the appropriate column headers. Moreover, it is also possible to rearrange the columns and change the column size.

**User Notifications**

1. Click the [User Notifications] tab to view the relevant information. The User Notifications tab appears.

2. Enter any comments for the user notifications.

3. Check or review the following:
   - **WAREHOUSE RCPT**
     Check identifying the user to be notified for warehouse receipt.
   - **HOUSE AIRWAYBILL**
     Check identifying the user to be notified for house airway bill.
   - **BILL OF LADING**
     Check identifying the user to be notified for bill of lading.
   - **PICKUP**
     Check identifying the user to be notified for pickup.

**Email Notifications**

1. Click the [Email Notifications] tab to view the relevant information. The Email Notifications tab appears.

2. Enter/ select the following information:
   - **EMAIL NOTIFICATION**
     Check to enable the email notification option.
   - **EMAIL**
     Text identifying the email address for the notification.
3. Select the following items for email notification:
   - **WAREHOUSE RCPT**
     Check identifying the user to be notified for warehouse receipt.
   - **HOUSE AIRWAYBILL**
     Check identifying the user to be notified for house airway bill.
   - **HOUSE BILL OF LADING**
     Check identifying the user to be notified for bill of lading.
   - **CARRIER PICKUP**
     Check identifying the user to be notified for pickup.
   - **WAREHOUSE WITHDRAW**
     Check identifying the user to be notified for warehouse withdraw.
   - **AIR MANIFEST**
     Check identifying the user to be notified for air manifest.
   - **OCEAN MANIFEST**
     Check identifying the user to be notified for ocean manifest.
   - **COURIER AGENT MANIFEST**
     Check identifying the user to be notified for courier agent manifest.

**Comments**

1. Click the [Comments] tab to view the relevant information.
   The *Comments* tab appears.

2. Enter any notes in the Comments textbox.

**Accounting**

1. Click the [Accounting] tab to view the relevant information.
   The *Accounting* tab appears.
2. Enter or select the following [Accounting] information;
   - **CUST. TYPE**
     Customer type identifying the accounting.
   - **ID TYPE**
     Type identifying the customer accounting.
   - **TERMS**
     Payment terms identifying the accounting.
   - **SALES REP.**
     Sales representative for the accounting.
   - **ID NUMBER**
     Number identifier for the accounting.
   - **CREDIT LIMIT**
     Credit limit for the accounting.
   - **MASTER ID**
     Code identifying the master record.
   - **VENDOR ID**
     Code identifying the vendor record.

3. Select from one of the following [Warehouse Rate] options;
   - **0-DEFAULT**
     Set the warehouse rate to system default.
   - **1-WEIGHT**
     Set the warehouse rate to be based on weight.
   - **2-CUBIC**
     Set the warehouse rate to be based on cubic.
   - **3-CARGO TYPE**
     Set the warehouse rate to be based on cargo type.

4. You can use Add/Edit/Delete to work with [Notes] information.

**Save Customer Record**

1. Click [X] to save and close the New Record tab.
   The *Customer Confirmation* dialog appears.
2. Click [Yes] to save the changes to the customer record.

**Working with the Vendors**

You can add new vendor, remove an existing vendor and view information related to the existing vendors.

**Add Vendor Record**

To add a new vendor;

3. Click **Vendors** under the [Accounting - Vendor] menu.

   The **Vendors** dialog appears.

4. Select File>New Record.

   The **New Record** tab is added to the **Vendors** dialog.
5. Enter the following information:

- **VENDOR ID**
  Unique identifier for defining new vendor. Based on the system settings, this field is automatically generated for every new vendor record.

- **NAME**
  Name of the vendor.

- **ADDRESS**
  Address of the vendor.

- **CITY**
  City of the vendor.

- **STATE**
  State of the vendor.

- **ZIP**
  Zip code for the vendor.

- **COUNTRY**
  Country of the vendor.

- **PHONE**
  Phone of the vendor.

- **FAX**
  Fax of the vendor.

- **MOBILE**
  Mobile number of the contact person.

- **EMAIL**
  Email of the contact person.

6. Select from one of the following [Account Status] options;

- **ACTIVE**
  Account status identifying an active customer.

- **ON HOLD**
  Account status identifying a customer under processing.

- **NON ACTIVE**
  Account status identifying a non-active customer.

7. Select from one of the following [Account Type] options;

- **AIRLINE**
  Account type identifying the vendor account for airline.

- **OCEAN CARRIER**
Account type identifying the vendor account for an ocean carrier.

- **AGENT**
   Account type identifying the vendor account for an agent.

- **OTHER**
   Account type identifying the vendor account to be default.

**Working with the Vendors**

**Add Vendor Record**

**Contacts**

To add/edit/delete contacts information for the vendors:

1. Click the [Contacts] tab to view the relevant information.
   The Contacts tab appears.

2. Right click and select from one of the following:
   - **ADD**
     To add a new contact for the vendor.
   - **EDIT**
     To edit an existing contact for the vendor. You should select the record(s), right-click and choose [Edit] from the popup menu.
   - **DELETE**
     To remove an existing contact for the vendor. You can use the keyboard key [delete], click [Delete] on the toolbar or select the record(s) and right-click and choose [Delete] from the popup menu.

   The user can sort the list by clicking on the appropriate column headers. Moreover, it is also possible to rearrange the columns and change the column size.

**Comments**

1. Click the [Comments] tab to view the relevant information.
   The Comments tab appears.

2. Enter your notes in the Comments textbox.
**Accounting**

1. Click the [Accounting] tab to view the relevant information.
   
   The Accounting tab appears.

2. Enter or select the following [Accounting] information;
   
   - **VENDOR TYPE**
     
     Vendor type identifying the accounting.
   
   - **ID TYPE**
     
     Type identifying the vendor.
   
   - **TERMS**
     
     Payment terms for vendor.
   
   - **EXPENSE ACCT**
     
     Vendor expense account for the accounting.
   
   - **ID NUMBER**
     
     Number identifier for the accounting.
   
   - **CREDIT LIMIT**
     
     Credit limit for the accounting.
   
   - **MASTER ID**
     
     Code identifying the master record.
   
   - **CUSTOMER ID**
     
     Code identifying the vendor record.

3. You can use Add/Edit/Delete to work with [Notes] information.

**Air**

1. Click the [Air] tab to view the relevant information.
   
   The Air tab appears.
2. Enter or select the following [Airline] information:
   - **ACCOUNT NUMBER**
     Number identifying the airline account.
   - **CONSOLIDATION COMMISSION %**
     Percentage for airline commission consolidation.
   - **DIRECT COMMISSION %**
     Percentage identifying the direct commission.
   - **DISCOUNT %**
     Percentage discount for the consolidation/direct commission.

3. Enter your comments in the [Notes] textbox.

---

**Ocean**

1. Click the [Ocean] tab to view the relevant information.
   The Ocean tab appears.

2. Enter or select the following [Ocean Carrier] information:
   - **ACCOUNT NUMBER**
     Number identifying the airline account.
   - **CONSOLIDATION COMMISSION %**
     Percentage for airline commission consolidation.
Working with Logistics

- **DIRECT COMMISSION %**
  Percentage identifying the direct commission.
- **DISCOUNT %**
  Percentage discount for the consolidation/direct commission.

3. Enter your comments in the [Notes] textbox.

**Save Vendor Record**

1. Click [X] to save and close the New Record tab.
   The Vendor Confirmation dialog appears.

2. Click [Yes] to save the changes to the vendor record.

**Working with the Warehouse**

**Creating Warehouse Receipt**

To create a new warehouse receipt:

1. Select **Warehouse** from the system menu toolbar.
   The warehouse options appear on the workspace.
2. Click **Warehouse Receipts Entry** under the [Warehouse Receipts] menu.
   The Warehouse Receipts Entry dialog appears.
The *New Record* tab is added to the **Warehouse Receipts** dialog.

4. Enter the following information:
   - **WR #**  
     Warehouse receipt number that uniquely identifies the record.
   - **DATE IN**  
     Date/time of warehouse receipt generation.
   - **DIVISION**  
     Warehouse division identifier. To define new identifier refer to the section “Define Warehouse Division” in this user guide.
   - **USER ID**  
     User name identifying the currently logged-in user.
   - **SHIPPING INST. #**  
     Unique code identifying the shipping instruction record.
   - **EXPIRED ON**  
     Date identifying the expiry.
   - **STORAGE**
Warehouse receipt storage which can be either 0-None or 1-Monthly.

- **STATUS**
  Warehouse receipt status. For example, OPEN, CLOSED, etc.

- **FROM [ADDRESS]**
  Address for Shipper/ Consignee/ Third-party or Supplier.

- **MODE**
  Mode from one of the following: AIR, OCEAN or TRUCK.

- **BLDG/ WHSE**
  Building or warehouse description. Select <add new> from the listbox to define a new building or warehouse record.

- **ORIGIN**
  Code identifying the origin. Click to define new origin record. It can be either Domestic or International.

- **DESTINATION**
  Code identifying the destination. Click to define new destination record. It can be either Domestic or International.

- **SERVICE**
  Unique code identifying the service. Select <add new> from the listbox to define a new service record.

- **CURRENCY**
  Code identifying the currency. Select <add new> from the listbox to define a new currency record.

### Setup Inland Info

To define Inland information;

5. Click **Inland** tab.
   
The Inland tab fields appear.

6. Enter the following:
   
   - **CARRIER**
     Unique code identifying the carrier information. Click to define the new carrier record.

   - **RECEIVED BY**
     Specify the receiver name for the item(s).

   - **CARRIER TERMS**
     Terms for the inland carrier. For example, COLLECT, ON ACCOUNT/ CREDIT, or PREPAID.

   - **DATE**
     Date identifying the inland record.

   - **FREIGHT AMOUNT $/ CHECK #**
     Amount identifying the freight charges along with the check number.
• **COD AMOUNT $/ CHECK #**  
Amount identifying the COD along with the check number.

**Setup Airline Carrier Info**

To define Airline Carrier information:

1. Click **Airline Carrier** tab.  
   The **Airline Carrier** tab fields appear.

2. Enter the following:
   - **AGENT**  
     Unique code identifying the agent information. Click ![Agent](Image) to define the new agent record.  
   - **AWB #**  
     Number identifying the AWB.

3. To define new item, rightclick and select [Add] from the popup menu.  
   The **New Item Details** dialog appears.
**Setup Pro Numbers Info**

To define pro numbers information;

4. Click **Pro Numbers** tab.
   The Pro Numbers tab dialog appears.

5. To add new item, right-click and select [Add] from the popup menu.
   The New PRO Number Details dialog appears.

![New PRO Number Details dialog](image)

**Setup Hazardous Info**

To define hazardous information;

6. Click **Hazardous** tab.
   The Hazardous tab dialog appears.

![Hazardous tab dialog](image)
7. Enter the following information:
   - **CONTACT**
     Name of the contact.
   - **PHONE**
     Phone number of the contact.

8. To define new hazardous detail record, rightclick and select [Add] from the popup menu. The *New Hazardous Details* dialog appears.

   ![New Hazardous Details](image)

   **Setup Containers Info**

   To define containers information:

9. Click **Containers** tab.
   The *Containers* tab dialog appears.

   ![Containers Tab](image)

   10. To define new container record, rightclick and select [Add] from the popup menu. The *New Container Details* dialog appears.
Search & Filters

This section explains the features for printing forms like warehouse receipts and reports. Moreover, it also describes the feature to export these forms to portable document format (PDF).

Using the Search Feature

To use the search feature:

1. Select the search criteria from the [Search By] drop-down list on the search toolbar.
2. Enter the keywords against the search criteria. The search keywords can be plain text or may include the wildcard characters. For more details, please refer to the section “Using wildcard characters”.
3. Click **Search** on the search toolbar.

Using wildcard characters

A wildcard character is a keyboard character such as an asterisk (*) is used to represent one or more characters when you are searching for records/transactions. Wildcard characters are often used in place of one or more characters when you do not know what the real character is or you do not want to type the entire name.

Asterisk (*) is used as a substitute for zero or more characters. For example, if you are looking for a shipper record that you know starts with “global” but you cannot remember the rest of the name, type the following:

```
global*
```

This locates all records that begin with “global”.

Define the Search Filter

To define the search filter:

1. Click [Build Filter] to specify the search filter on the fields.
   
   The **Build Filter** dialog appears.
2. Select the search field on the Field drop-down list. For example, Name, Email, etc.
3. Specify the **Operator** from one of the following:
   - **IS EQUAL TO**
     The value is equal to the search keyword.
   - **IS NOT EQUAL TO**
     The value is not equal to the search keyword.
   - **IS LESS THEN**
     The value is less than the search keyword.
   - **IS LESS THEN OR EQUAL TO**
     The value is less than or equal to the search keyword.
   - **IS GREATER THEN**
     The value is greater than the search keyword.
   - **IS GREATER THEN OR EQUAL TO**
     The value is greater than or equal to the search keyword.
   - **IS BETWEEN**
     The value is between the specified ranges.
   - **IS NOT BETWEEN**
     The value is not between the specified ranges.
4. Enter the **Value(s)** for the search filter based on the search criteria and the operation.
5. Click **Add Filter** to define the search filter.
   The new filter is added to the [Filters] listbox.
6. Click **Apply** to save changes and close the *Build Filter* dialog.

### Delete the Search Filter
To delete the search filter:

1. Click [Build Filter] to see the list of search filters.
   The *Build Filter* dialog appears.
2. Select the filter in the defined list, right-click and choose [Delete] from the popup menu. The selected filter is removed from the [Filters] listbox.
3. Click **Apply** to save the changes.

**Print & Export**

**Print & Export**

This section explains the features for printing forms like warehouse receipts and reports. Moreover, it also describes the feature to export these forms to portable document format (PDF).

**Using the Print Feature**

To print forms and reports:

1. Click the [Print•] icon on the standard toolbar. The **Print** dialog appears.

2. Select the target printer from the list of defined printers.
3. Check the [Preview] option if you wish to preview the printing output.
4. Click **Print**.
Printing Warehouse Receipts

To print warehouse receipts:

1. Click the [Warehouse] icon in the application workspace and review the Receipts menu options.

2. Click the [Warehouse Receipts Entry] from the Receipts menu.

The Warehouse Receipts dialog appears.

1. Double-click the record from the list to open the warehouse receipt.

The Warehouse Receipts dialog appears.
2. Click the icon on the standard toolbar. The Forms to Print dialog appears.

3. Select or enter the following [Warehouse Receipt] information:
   - **PRINT**
     Check to enable the printing option on the target printer.
   - **FORM ID**
     Form identifier from the list of defined items.
   - **SENT TO**
     List of target printers installed on your machine.
   - **COPIES**
     Number identifier the copies to be sent to the selected printer.
   - **PREVIEW**
     Check to enable the preview print.

4. Select or enter the following [Forwarder Certificate of Reception] information:
   - **PRINT**
     Check to enable the printing option on the target printer.
   - **FORM ID**
     Form identifier from the list of defined items.
   - **SENT TO**
     List of target printers installed on your machine.
5. Click **Print** to print the warehouse receipt.

The **Print Preview** dialog appears.

6. Click icon to send the receipt to printer.
User Access Rights

User Access Rights

In this section:

- Users and Security
- Working with Users
- Working with Groups
- Working with System Modules
- Working with System Applications

This section guides you through using the Logisuite software. It includes user login and authentication, starting and exiting the Logisuite software. Moreover, it explains the other settings related to users and security.

Users and Security

You can use the Security Setup dialog to create and view different aspects of security including the users, and security groups.

Security Setup

To launch the security setup:

1. Click File>Users & Security from the menu.

The Security Setup dialog appears.
The security setup allows working with the following items:

- **USERS**
  Lists all the users for the system and their access rights/privileges.
- **GROUPS**
  Lists all the groups defined for the system security.
- **SYSTEM MODULES**
  Lists all the integrated modules installed under the system and their access details.
- **SYSTEM APPLICATIONS**
  Lists all the system applications and their access details.

**Working with Users**

**Add User**

To add user to the list:

1. Under the **System Security** menu, click **Users** to view the user list.
   The **User List** panel shows the defined users.

2. Right click on the **User List** panel and select [New User] from the menu.
   The **New User** dialog appears.
3. Enter the following information.

- **USER ID**
  Unique identifier for the new user name.

- **NAME**
  Name of the new user.

- **PASSWORD**
  Password of the new user.

- **ADMINISTRATOR**
  Check to specify if the new user is the administrator level account.

4. Click **OK**.
   The new user is added to the user list.

---

**Edit User**

To modify user information:

5. Under the *System Security* menu, click **Users** to view the current defined users in the list.
   The *User List* panel shows the defined users.
6. Select the user in the **User List** and right click to choose [Edit User] from the menu. The *Edit User* dialog appears.

7. Modify the following information.
   - **USER ID**
     Unique identifier for the new user name.
   - **NAME**
     Name of the new user.
   - **PASSWORD**
     Password of the new user.
   - **ADMINISTRATOR**
     Check to specify if the new user is the administrator level account.

   You can change the password by specifying the new password for the selected user.

8. Click **OK**
   The user information is updated in the user list.
Delete User

To remove user from the list:

1. Under the System Security menu, click Users to view the current defined users in the list. The User List panel shows the defined users.
2. Select the user in the **User List** and right click to choose [Delete Selected User] from the menu. The *Delete Confirmation* message box appears.

3. Click **Yes**.
   The user is removed from the user list.
Working with Groups

You can add/modify/remove the security groups.

New Group

To define a new security group:

1. Under the System Security menu, click Groups to view the groups list. The Security Group list shows the defined groups.

3. Enter the following information.
   - **GROUP ID**
     Unique identifier for the new group.
   - **DESCRIPTION**
     Text describing the new group.

4. Click **OK**.
   The new group is added to the Security Groups list.
**Edit Group**

To modify an existing security group:

1. Under the **System Security** menu, click **Groups** to view the groups list. The **Security Group** list shows the defined groups.
2. Select the group in the **Security Groups** and right click to choose [Edit Group] from the menu. The *Edit Group* dialog appears.

3. Review/ Modify the following information.
   - **GROUP ID**
     Unique identifier for the new group.
   - **DESCRIPTION**
     Text describing the new group.

4. Click **OK**.
   The group information is modified and the Security Groups list is updated.

**Delete Group**
To remove an existing security group:

1. Under the **System Security** menu, click **Groups** to view the groups list.
   The *Security Group* list shows the defined groups.
2. Select the group in the **Security Groups** and right click to choose [Delete Group] from the menu. The **Delete Confirmation** dialog appears.

3. Click **Yes**.

   The group is removed from the Security Groups list.

---

**Add or Remove User in Security Group**

**Add or Remove User in Security Group**

You can add or remove user in the security groups.

**Add User to Security Group**

To add an existing user in the security group:

1. Under the **System Security** menu, click **Groups** to view the groups list.

   The **Security Group** list shows the defined groups.
1. Select the target group from the **Groups** list.
   The **Security Group** list shows the defined users for this group.

2. Right click to choose [Add User] from the menu.
   The **Add User** dialog appears.
3. Select the User in the list and then click **Add User**.

The selected user is added to the group member list.

Remove User from Security Group

To remove an existing user from the security group:

1. Under the **System Security** menu, click **Groups** to view the groups list.

The **Security Group** list shows the defined groups.
1. Select the target group from the **Groups** list. The **Security Group** list shows the defined users for this group.

2. Under the **Member User List**, select the target user and then right click to choose [Remove User] from the menu.

The selected user is removed from the member list.
Working with System Modules

You can define access rights for the system modules.

Add User or Group

To give access to a particular user or group for a system module:

1. Under the System Security menu, click **System Modules**. The **System Modules** list appears.
2. Select the target system module from the list.  
The Module Access Details list appears.

3. Right click and select [Add User or Group] from the menu.  
The User dialog appears.
4. **Select the following information.**

- **USERS**
  Click and then select the user from the list if you want to grant a user the access rights.

- **GROUPS**
  Click and then select the group from the list if you want to grant a group the access rights.

- **RUN**
  Check if you want to assign the access rights for Run.

- **ADD**
  Check if you want to assign the access rights for Add.

- **EDIT**
  Check if you want to assign the access rights for Edit.

- **PRINT**
  Check if you want to assign the access rights for Print.

- **DELETE**
  Check if you want to assign the access rights for Delete.

5. **Click OK.**

The **Module Access Details** lists the user/group being added along with the access rights information for this module.
**Modify Access Rights**

To change access rights for a particular user or group for a system module:

1. Under the System Security menu, click **System Modules**.
   The System Modules list appears.
2. Select the target system module from the list. The Module Access Details list appears.

3. Select the target user/group in the module list, and right-click and choose [Edit Access Rights] from the menu.

The User dialog appears.
1. Modify the following information.
   - **RUN**
     Check if you want to assign the access rights for Run.
   - **ADD**
     Check if you want to assign the access rights for Add.
   - **EDIT**
     Check if you want to assign the access rights for Edit.
   - **PRINT**
     Check if you want to assign the access rights for Print.
   - **DELETE**
     Check if you want to assign the access rights for Delete.

2. Click **OK**.

   The user/group access rights are modified in the list.

---

**Remove User or Group**

To remove access rights for a particular user or group for a system module:

1. Under the System Security menu, click **System Modules**.
   The **System Modules** list appears.
2. Select the target system module from the list. The Module Access Details list appears.

3. Select the target user/group in the module list, and right-click and choose [Remove User or Group] from the menu. The Delete Confirmation dialog appears.
4. Click **Yes**.

The user/group is removed from the access rights list for the target system module.
Glossary

AIR WAYBILL
The contract between shipper and carrier covering international and domestic transportation of cargo to a specified destination. The air waybill may also be referred to as the source document.

BILL OF LADING
Contract of carriage between shipper and steamship company which is the ship owner's receipt for the goods and is the document of title to them.

CUBIC FOOT
1,728 cubic inches.

CUBIC TON
40 cubic feet.

CUBIC CAPACITY
The carrying capacity of a truck according to measurement in cubic feet.

CWT
Hundred weight.

CONSIGNEE
A person or company to whom commodities are shipped.

CONSIGNMENT
A shipment of goods to a consignee.

CONSIGNOR
A person or company shown on the bill of lading as the shipper.

CONTAINER
A truck trailer body that can be detached from the chassis for loading into a vessel, a rail car or stacked in a container depot. Containers may be ventilated, insulated, refrigerated, flat rack, vehicle rack, open top, bulk liquid or equipped with interior devices. A container may be 20 feet, 40 feet, 45 feet, 48 feet or 53 feet in length, 8'0" or 8'6" in width, and 8'6" or 9'6" in height.

CORRESPONDENT BANK
A bank that, in its own country, handles the business of a foreign bank.

CUSTOMS
Government agency charged with enforcing the rules passed to protect the country's import and export revenues.

DEMURRAGE
A penalty charge against shippers or consignees for delaying the carrier's equipment beyond the allowed free time. The free time and demurrage charges are set forth in the charter party or freight tariff.

DOOR-TO-DOOR
Through transportation of a container and its contents from consignor to consignee. Also known as House to House. Not necessarily a through rate.

EXPORT
Shipment of goods to a foreign country.

FREIGHT
Merchandise hauled by a transportation line.

FREIGHT-ASTRAY
A shipment miscarried or unloaded at the wrong terminal, billed and forwarded to the correct terminal, free of charges, on account of being astray, hence the term "freight-astray".

FREIGHT BILL
Document for common carrier shipment. Gives description of the shipment, amount of charges, taxes and whether prepaid or collect. Charges paid by the shipper are called prepaid shipment bills. Charges collected at designation are called destination or collect shipment bills.

FREIGHT LINE CHARGE
The cost of transporting shipments.

**FREIGHT CLAIM**
A demand upon Yellow for the payment of overcharge or loss or damage sustained by the shipper or consignee.

**FREIGHT FORWARDER**
A person whose business is to act as an agent on behalf of the shipper. A freight forwarder frequently makes the booking reservation.

**HUNDRED WEIGHT**
A statement of weight meaning 100 pounds, abbreviated CWT.

**IMPORT**
To receive goods from a foreign country.

**IMPORT LICENSE**
A document required and issued by some national governments authorizing the importation of goods.

**INVOICE**
An itemized list of goods shipped to a buyer, stating quantities, prices, shipping charges, etc.

**IRREVOCABLE LETTER OF CREDIT**
Letter of credit in which the specified payment is guaranteed by the bank if all terms and conditions are met by the drawee and which cannot be revoked without joint agreement of both the buyer and the seller.

**LCL OR LESS THAN CONTAINER LOAD**
For use with smaller shipments, boxes, crates etc. The shipment is then delivered to a forwarder's or shipping line's consolidation point to be shipped on a specific vessel.

**LETTER OF CREDIT (LC)**
A document, issued by a bank per instructions by a buyer of goods, authorizing the seller to draw a specified sum of money under specified terms, usually the receipt by the bank of certain documents within a given time.

**MARINE INSURANCE**
Broadly, insurance covering loss or damage of goods at sea. Marine insurance typically compensates the owner of merchandise for losses sustained from fire, shipwreck, etc., but excludes losses that can be recovered from the carrier.

**QUOTATION**
An offer to sell goods at a stated price and under stated terms.

**RO/RO**
A shortening of the term, “Roll On/Roll Off.” A method of ocean cargo service using a vessel with ramps which allows wheeled vehicles to be loaded and discharged without cranes.

**ROLL-ON/ ROLL-OFF VESSELS**
Ships specially designed to carry wheeled containers or trailers using interior ramps.

**SHIPPER**
The person or company who is usually the supplier or owner of commodities shipped. Also called Consignor. A classification, storage or switching area.

**TENDER**
To offer goods for transportation, or to offer to place trucks for loading or unloading.

**VOLUME RATE**
Commodity rates which are specifically made subject to a minimum weight of 10,000 pounds or more.

**WAREHOUSE**
A place for the receipt and storage of goods.

**WAREHOUSE RECEIPT**
A receipt given for goods placed in a warehouse.

**WAYBILL**
Description of goods sent with a common carrier shipment (Same as freight bill).

**WEIGHT SHEETS**
Itemized list furnished by shippers to weighing bureaus showing articles in each consignment.